Chapter

3

Work Orders Module

Work Orders can be manually generated from the Work Requests or Work Orders modules or they can be generated automatically by performing a PM generation. How ever a work order is created, their details can be updated or modified from the Work Order module. This Chapter describes how to use the Web Work, Work Orders module.

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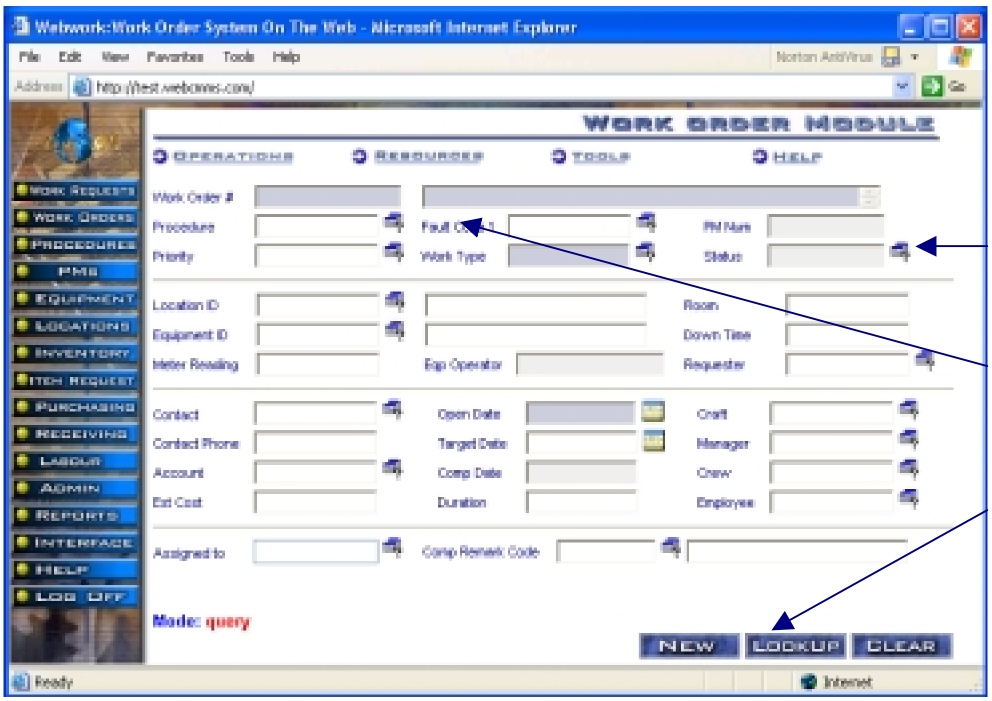
1.1 Overview of the Work Order Module

The Work Order module is used to create, approve and close work orders.

Click on the WORK ORDERS button WORK ORDERS on the left hand side of the screen to access the Work Orders module.

When you enter the Work Orders module you will be in Query mode as shown in the screen below:



Click on the query button to select information from the Web Work database.

Click on any field name to open the help window for that field.

Enter information into any field and then click on the LOOKUP button to query the database for records matching the criteria you selected.

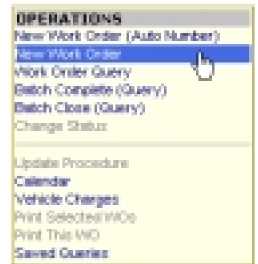
The OPERATIONS OPERATIONS, RESOURCES RESOURCES, TOOLS TOOLS and HELP HELP drop down menus contain the various features available in the Procedures module.

Web Work includes "help files" for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

2.1 Creating New Work Orders

Work Orders can be created from Work Requests or they can be created in the Work Order module. Preventive Maintenance Work Orders can also be created in the PM module. See the PMs chapter of this manual for more information on PM Work Orders.

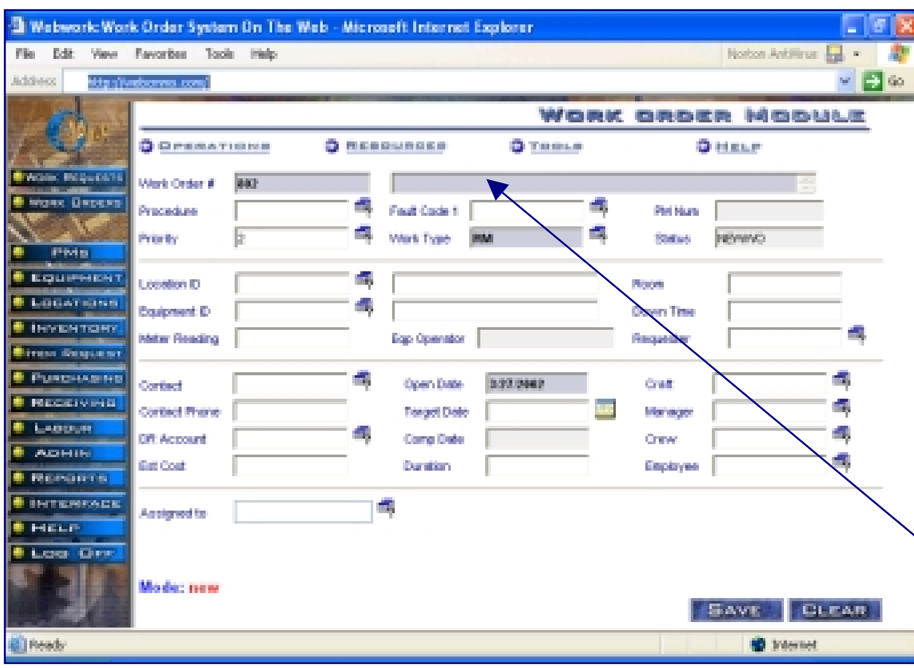
2.1.1. To Create a Work Order



- Enter the WORK ORDERS module  by selecting it from the menu on the left hand side of the Web Work screen.
- Click on the  menu and select New Work Order or New Work Order (Auto Number) from the drop down menu.

Work Order auto numbering can be set up with a specified number of digits, prefixes etc. See: Operations, Set Auto-Number in the Admin module for more information on this feature.

- The following screen will open:



The dark colored fields are required fields.

The light colored fields are read only fields.

All other fields are optional.

- Enter information into the fields displayed on the screen. For information on field contents click on any field name – this will open a popup help window for that field name.

  NOTE: The *Work Order #, Description, Status, Type and Open Date* fields are the only <u>required</u> fields, all other fields are optional.

A default Priority code such as WAPPR (Waiting Approval) can be set up. See Admin – System Defaults for more information. A default Work Order type such as RM (Regular Maintenance) can be set up. See Admin. – System Defaults for more information.

- Click on the SAVE button at the bottom right hand side of the screen to save the work order.

- You will then be in edit mode. You can edit and resave the work order, print the work order, add estimates to the work order or continue working in the module of your choice by clicking on the module button on the left hand side of the screen.

3.1 Changing the Status of a Work Order

As a work order flows through the system of your organization, its status may require changing a number of times. IE: From new work order, to approved work order, to pending work order to completed work order. The Web Work Change Status field is used to make these work order status changes.

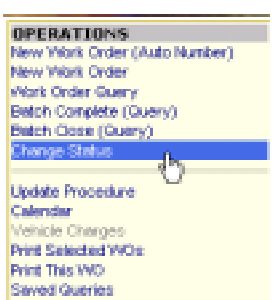
There are five main system codes. WTAPPR (Waiting Approval), APPR (Approved), COMP (Completed), CLOSE (Closed) and CANC (Cancelled). In addition you may create a number of sub-codes within these main categories.

3.1.1. <u>Approving Work Orders</u>

- Enter the WORK ORDERS module by selecting it from the menu on the left hand side of the Web Work screen.

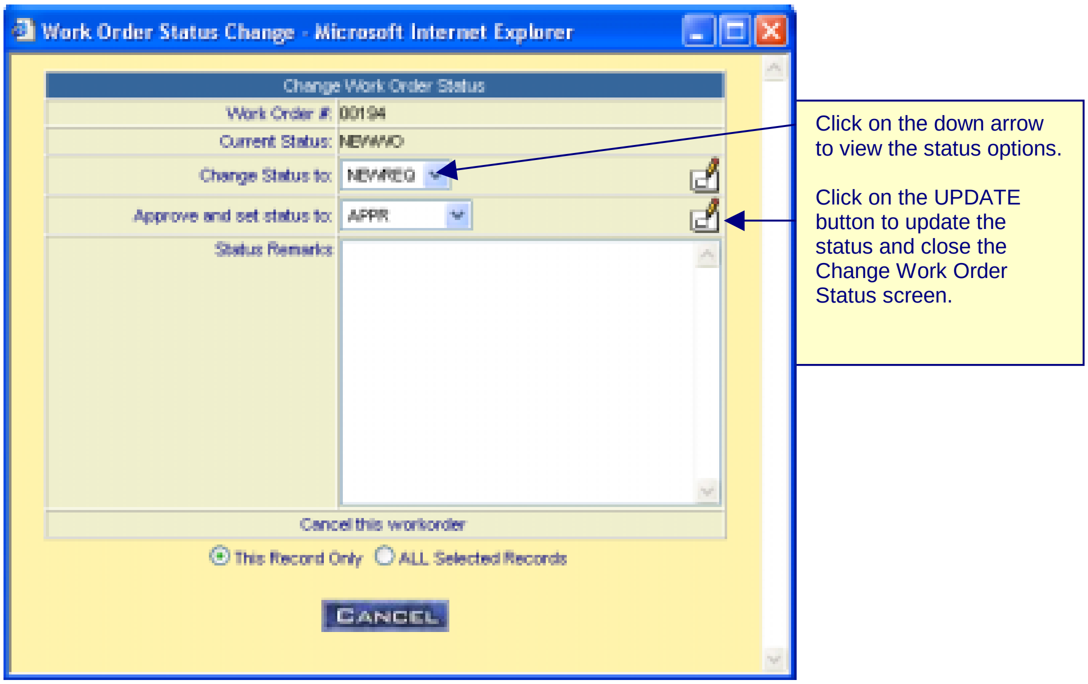
- Perform a work order query to locate and retrieve the work orders you want to approve. See Work Order Queries for more information on performing work order queries.

- Click on the menu and select Change Status from the drop down menu.



Work Orders must have a status of approved before Actuals can be added to them.

- A window similar to the one shown below will open:



- Click on the down arrow on the "Approve and Set Status To" field and select APPR from the down down list.

- Click on the UPDATE button to update the status. The Change Work Order Status window will close and you will be returned to the main screen of the work order.

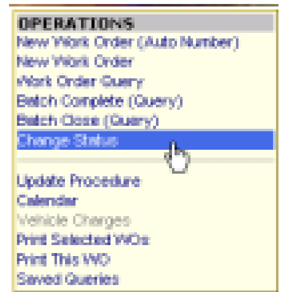
- Click on the RADIO button beside This Record Only or All Selected Records.

  NOTE: APPR will now appear in the Work Order Status field and approved will appear on the bottom right hand side of the screen.

If your organization wishes to have Work Orders approved automatically when created, Web Work can be setup to automatically perform this task. See the System Admin – System Defaults section of this manual for more information on setting up this feature.

3.1.2. Changing the Status of a Work Order

- Locate and open the applicable work order. See Work Order Queries for more information.
- Click on the Operations menu OPERATIONS and select Change Status from the drop down menu.
- Click on the down arrow beside the field where you want to change the status.
- Click on the update button to update the status and return to the main work order screen.



WTAPPR
A work order with a status of WTAPPR:

- Can be changed to a sub-category of WTAPPR ie: NEWWO, NEWREQ, PENDING, WMTRL
- Can be changed to APPR (approved) or a sub-category of approved ie: INPRG
- Can be cancelled

Estimates and other editing functions can be performed on a work order with a status of WTAPPR (or a sub-category thereof).

APPR
A work order with a status of APPR:

- Can be changed to a sub-category of APPR
- Can be changed to WTAPPR or a sub-category thereof
- Can be completed

Actuals can be added to a work order with a status of APPR (or a sub-category thereof), but no other changes can be made.

If your system default – Approve Work Orders is set to NO, an approved work order cannot be cancelled unless you change the status of it to NEWWO or a sub-category of NEWWO first.

If your system default – Approve Work Orders is set to YES - then work orders with the status of approved can be cancelled.

COMP
A work order with a status of COMP:

- Can be changed to a sub-category of COMP
- Can be changed to APPR or a sub-category thereof
- Can be changed to CLOSE or a status thereof

Work order is finished, no changes can be made.

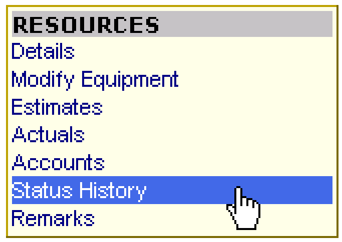
The remarks field can be used to add comments regarding the status of the work order or changes to the status. Type applicable comments in the remarks box before you click on the UPDATE button to update the status change.

CLOSE
A work order with a status of CLOSE:

- Record is archived
- NO changes can be made to the work order.

3.1.3. Work Order Status History

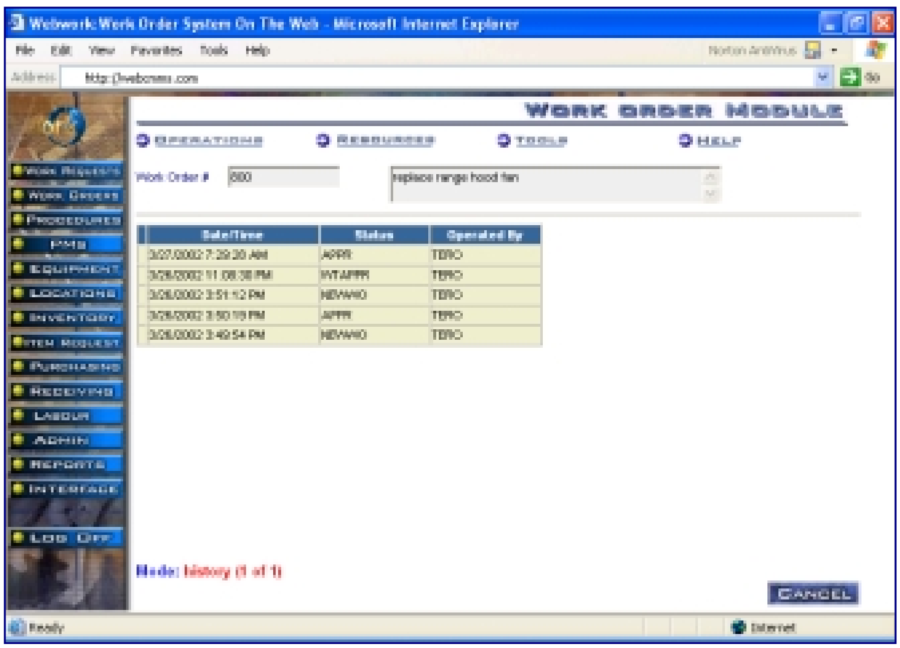
To view the status history for a work order:



- Open the applicable work order on the screen.

- Click on the RESOURCES menu and select Work Order Status History.

  The following screen will open:



- The first column shows the date and time of the status change.
- The second column shows the changed status.
- The third column shows name of the user who performed the status change.
- To exit Work Order status history click on the CANCEL button CANCEL.

4.1 Adding Estimates to a Work Order

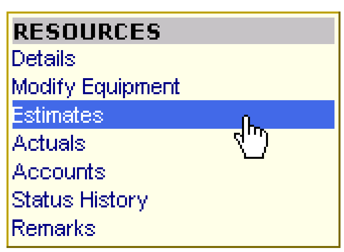
Estimates can be added to a work order to indicate the tasks, labour and materials required to complete a work order.

4.1.1. Adding Estimates - Tasks

By adding tasks to a work order, the employee assigned to complete a work order will be provided with a checklist of tasks for completing the work.

To add tasks to a work order:

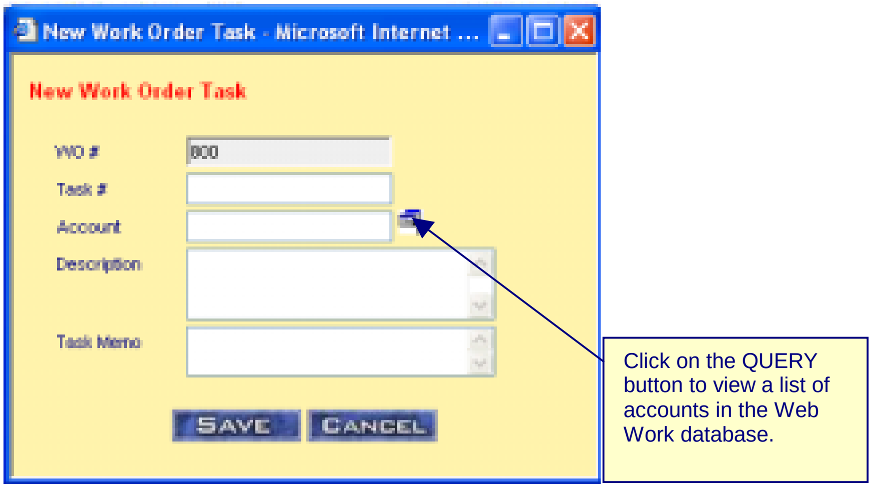
- Open the applicable work order in Edit mode.
- Click on the RESOURCES menu to display the drop down menu.
- Select Estimates from the drop down menu.



- In the Add Estimates screen there are three tabs: Tasks, Labour and Materials.

- Click on the Tasks folder to open it. Note: when you enter the Estimates screen, you will be in Estimate Task mode.

- Click on the NEW button at the bottom of the screen to open the New Work Order task screen as pictured below.



- Enter the Task #. This can be an alpha or numerical number.

- Enter an Account if applicable or click on the QUERY button to select an account from the Web Work database.

Leave the account field blank if this task is going to be split between multiple accounts. See Work Orders – Accounts for more information.

- In the description field enter the actual task that is to be performed.

- Enter any additional information pertaining to the task. IE: Safety information, MSDS information etc.

- Click on the SAVE button . This item will now be displayed when you are in the work orders Estimates screen for this work order.

- Click on the NEW button to add additional Tasks if required.

4.1.2. Adding Estimates - Labour

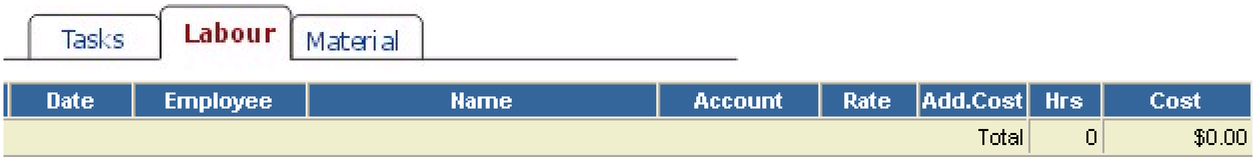
Add labour to a work order estimate to indicate the type of contractor/employee required to perform the work.

To add labour to a work order estimate:

- Open the applicable work order in Edit mode.

- Click on the RESOURCES menu to display the drop down menu.

- Select Estimates from the drop down menu.



- In the Add Estimates screen there are three tabs: Tasks, Labour and Materials. Note: when you enter the Estimates screen, you will be in EstimateTask mode.

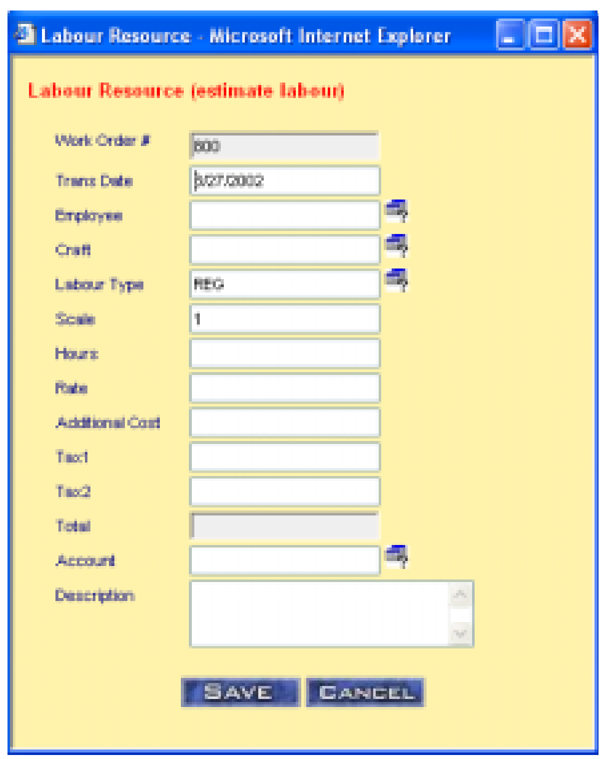
- Click on the Labour folder to open it. Click on the NEW button NEW to open the Add Labour screen.

- The Work Order # and Trans Date fields are filled in automatically. The Work Order field cannot be edited, however the Trans Date field can. To edit this field, delete the current date and add the date of your choice.

- Enter an employee or click on the QUERY button to select an employee from the Web Work database. If a rate for the employee you choose has been entered in the Labour module the rate field will be updated with this amount.
- Enter a craft or click on the QUERY button to select a craft from the Web Work database.

- Enter a Labour Type or click on the QUERY button to select a labour type from the Web Work database.

- The Scale automatically defaults to 1. To change this, delete the current scale and add the scale of your choice.



- Enter the estimated number of hours into the Hours field. When you enter the number of hours, the taxes and total will be calculated by the Web Work system.

- The Rate field will be filled in with the rate setup for the employee in the Labour module. To change this rate, delete the rate shown and enter the rate of your choice.

- Enter any additional cost. If an additional cost is added, the taxes and total will be updated accordingly.

- Enter Tax 1 and 2 if applicable. If taxes are entered the total will automatically be recalculated.

- Enter an account if applicable.

- The Details field displays the complete name of the Employee you choose.

- Click on the SAVE button at the bottom right hand side of the screen to save the labour estimate.

  This will return you to the Estimates screen in Labour mode where you can continue to add Labour, add Tasks or Materials or return to the main screen of the work order.

When you save a task, labour or material estimate, the estimate will be displayed in the table on the related estimate screen.

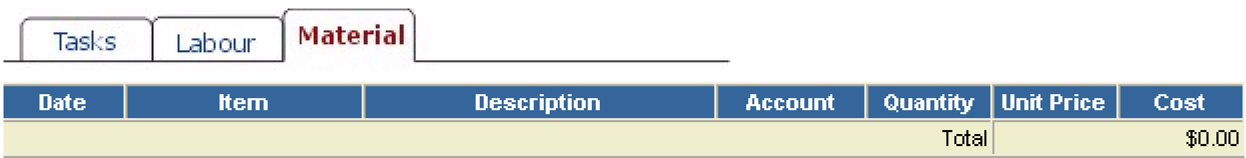
4.1.3. Adding Estimates - Materials

Add materials to a work order to indicate the items required to do a job.

To add materials to a work order:

- Open the applicable work order in Edit mode.
- Click on the RESOURCES menu to display the drop down menu.
- Select Estimates from the drop down menu.

  In the Add Estimates screen there are three tabs: Tasks, Labour and Materials.



- Click on the Material folder to open it. Note: when you enter the Estimates screen, you will be in Estimate Task mode.

- Click on the NEW button to open the Add Material screen.
- The Work Order # and Trans Date fields are filled in automatically. The Work Order # field cannot be edited, however the Trans Date field can. To edit this field, delete the current date and add the date of your choice.
- Enter a storeroom or click on the QUERY button to select a storeroom from the Web Work database.
- Click on the down arrow to select a Storeroom from those set up in the Web Work system and then click on the FILTER button to display a list of inventory in this storeroom.
- Click the radio button beside the inventory item you wish to select.

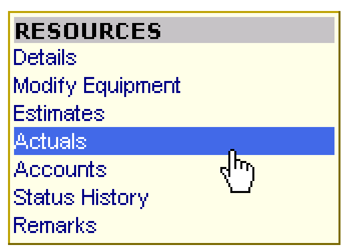
- This will populate the Storeroom, Item, Unit and Price fields on the Material Resource screen.
- Enter the quantity. The tax and extension fields will be calculated automatically.
- Enter any additional cost. When an additional cost is added, the tax and extension field will automatically be recalculated.
- Enter an account if applicable or click on the QUERY button to select an account from the Web Work database.
- The description field will automatically populate with the description of the Inventory item selected.
- Click on the SAVE button SAVE at the bottom right hand side of the screen to save the material estimate.
- This will return you to the Estimates screen in Estimate Material mode where you can continue to add Materials, add Tasks or Labour or return to the main screen of the work order.

To enter a non-inventory item, leave the Storeroom field blank and enter information into the other fields as required.

5.1 Work Orders - Actuals

Use the Work Orders – Actuals feature to add actual Tasks, Labour and Materials to a work order.

5.1.1. Adding Work Order Actuals

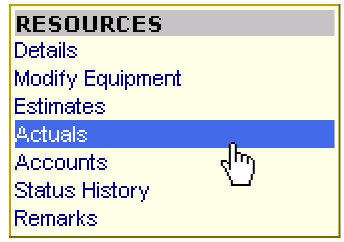


- Open the applicable approved work order in Edit mode.
- Click on the RESOURCES menu to display the drop down menu.
- Select Actuals from the drop down menu.

In the Add Actuals screen there are three tabs: Tasks, Labour and Materials

5.1.2. Adding Actual Tasks to a Work Order

To add actual tasks to a work order:



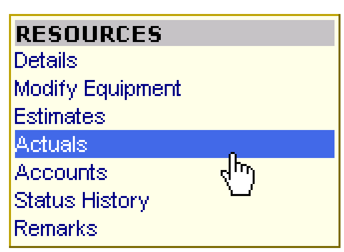
- Open the applicable work order in Edit mode.
- Click on the RESOURCES menu to display the drop down menu.
- Select Actuals from the drop down menu.

  In the Add Actuals screen there are three tabs: Tasks, Labour and Materials.

- Click on the Tasks folder to open it. Note: when you enter the Actuals screen, you will be in Actual Task mode.
- Click on the NEW button at the bottom of the screen to open the New Work Order task screen.
- The Work Order # field is populated automatically by the web work system.
- In the Task # field enter an alpha or numerical number for the task.
- Enter an account number for this task or click on the QUERY button to select an account from the Web Work database.
- In the description field enter a description of the task that is to be performed.
- Enter any additional information pertaining to the task into the Task Memo field. IE: Safety information etc.
- Click on the SAVE button. This item will now be displayed when you are in the work orders Actuals screen for this work order.
- Click on the NEW button to add additional Tasks if required.

5.1.3. Adding Actual Labour to a Work Order

To add actual labour to a work order:



- Open the applicable work order in Edit mode.
- Click on the RESOURCES menu to display the drop down menu.
- Select Actuals from the drop down menu.

In the Add Actuals screen there are three tabs: Tasks, Labour and Materials.

- Click on the Labour folder to open it.

- Click on the NEW button at the bottom of the screen to open the New Work Order Labour screen.

- The Work Order # and Trans Date fields are filled in automatically. The Work Order field cannot be edited, however the Trans Date field can. To edit this field, delete the current date and add the date of your choice.

- Enter an employee or click on the QUERY button to select an employee from the Web Work database. If a rate for the employee you choose has been entered in the Labour module the rate field will be updated with this amount.

- Enter a craft or click on the QUERY button to select a craft from the Web Work database.

- Enter a Labour Type or click on the QUERY button to select a labour type from the Web Work database.

- The Scale automatically defaults to 1. To change this, delete the current scale and add the scale of your choice.

- Enter the actual number of hours into the Hours field. When you enter the number of hours, the taxes and total will be calculated by the Web Work system.

- The Rate field will be filled in with the rate setup for the employee in the Labour module. To change this rate, delete the rate shown and enter the rate of your choice.

- Enter any additional cost. If an additional cost is added, the taxes and total will be updated accordingly.

- Enter Tax 1 and 2 if applicable. If taxes are entered the total will automatically be recalculated.

- Enter an account if applicable.

- The Details field displays the complete name of the Employee you choose.

- Click on the SAVE button at the bottom right hand side of the screen to save the labour actuals.

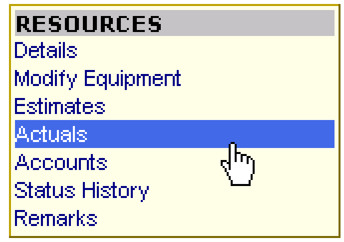
  This will return you to the Actuals screen in Actual Labour mode where you can continue to add Labour, add Tasks or Materials or return to the main screen of the work order.

When you save a task, labour or material actual, the actuals will be displayed in the table on the related actuals screen.

5.1.4. Adding Actual Materials to a Work Order

Add materials to a work order to indicate the items required to do a job.

To add materials to a work order:



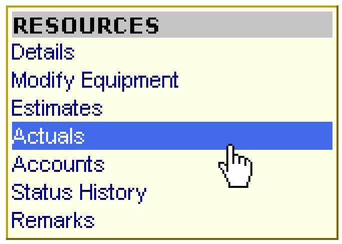
- Open the applicable work order in Edit mode.
- Click on the menu to display the drop down menu.
- Select Actuals from the drop down menu.
- In the Add Actuals screen there are three tabs: Tasks, Labour and Materials. Note: when you enter the Actuals screen, you will be in Actual Task mode.
- Click on the Material folder to open it.
- Click on the NEW button to open the Add Material screen.
- The Work Order # and Trans Date fields are filled in automatically. The Work Order # field cannot be edited, however the Trans Date field can. To edit this field, delete the current date and add the date of your choice.
- Enter a storeroom or click on the QUERY button to select a storeroom from the Web Work database.
- Click on the down arrow to select a Storeroom from those set up in the Web Work system and then click on the FILTER button to display a list of inventory in this storeroom.
- Click the radio button beside the inventory item you wish to select.
- This will populate the Storeroom, Item, Unit and Price fields on the Material Resource screen.
- Enter the quantity. The tax and extension fields will be calculated automatically.
- Enter any additional cost. When an additional cost is added, the tax and extension field will automatically be recalculated.
- Enter an account if applicable or click on the QUERY button to select an account from the Web Work database.
- The description field will automatically populate with the description of the Inventory item selected.
- Click on the SAVE button at the bottom right hand side of the screen to save the material actuals.
- This will return you to the Actuals screen in Actual Material mode where you can continue to add Materials, add Tasks or Labour or return to the main screen of the work order.

To enter a non-inventory item, leave the Storeroom field blank and enter information into the other fields as required.

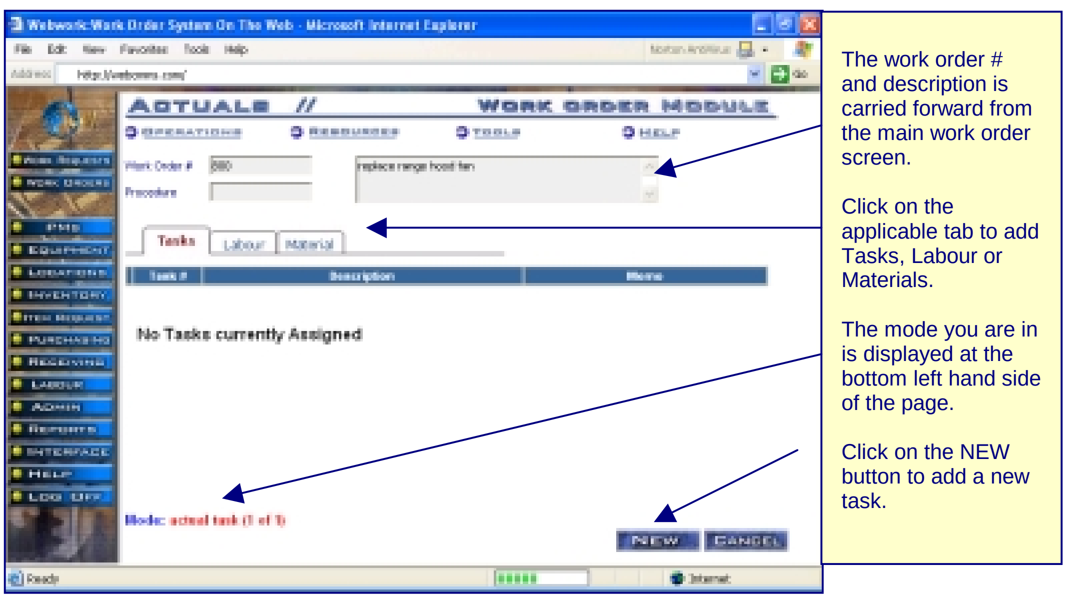
5.1.5. <u>Adding Actuals to a Work Order – Example 1</u>

In this example the work order has been issued to change a range hood fan in the kitchen. By adding tasks to this work order the tradesperson is provided with a checklist on how the work is to be performed.

- Create a work order with "Change Range Hood Fan" as its description.
- Approve the work order. NOTE: Work Orders must be approved before actuals can be added to the work order.
- Click on the the RESOURCES menu to display the drop down menu.
- Select Actuals from the drop down menu.

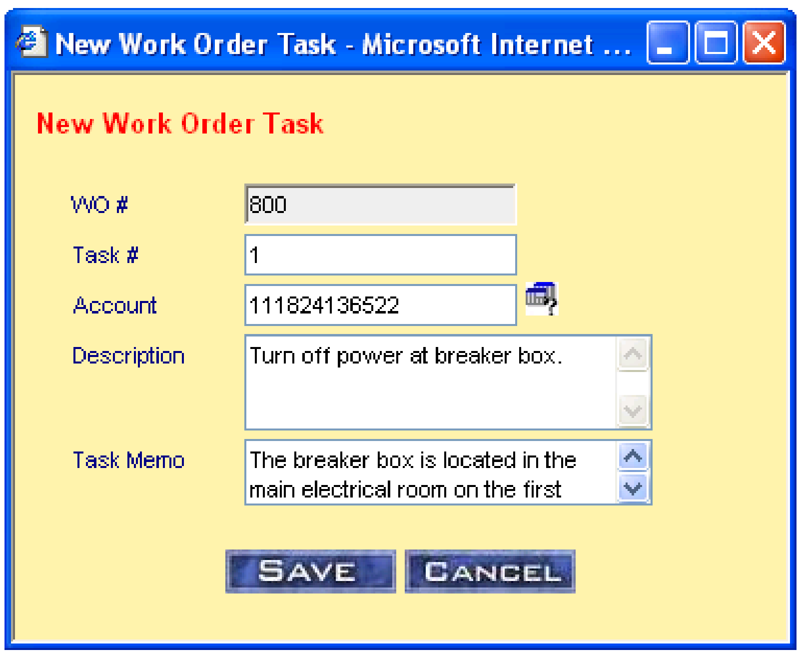


A screen similar to the one shown below will open:



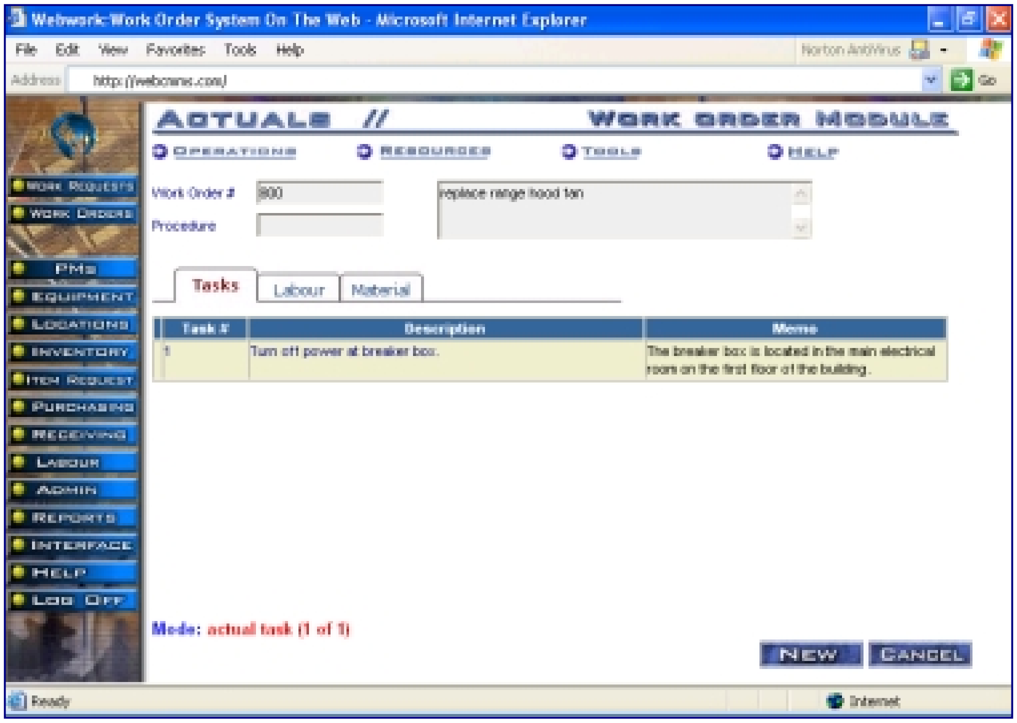
- Click on the NEW button at the bottom of the screen to open the New Work Order task screen.
- The Work Order # field is populated automatically by the web work system.
- Enter the number for this task (#) – in this example 1.
- Enter an account number for this task or click on the QUERY button to select an account from the Web Work database. In this example let's use the Maintenance Account Number: 111824136522.
- Enter a description of the task – Turn off power at breaker box.
- Enter any additional information pertaining to the task into the Task Memo field – the breaker box is located in the main electrical room on the first floor of the building.

  The completed New Work Order Task screen will look similar to the one pictured below:



- Click on the SAVE button to save the task.
- This item will now be displayed when you are in the work orders Actuals screen for this work order.

The work orders actuals screen is pictured below:



- Click on the NEW button NEW to add additional Tasks to this work order.

5.1.6. <u>Converting Estimates to Actuals</u>

When a work order is completed, the work order estimates can be converted to actuals and then edited as required.

To convert Work Order Estimates to Actuals:

- Open the applicable work order in Edit mode.
- Click on the RESOURCES menu to display the drop down menu.
- Select Estimates from the drop down menu.
- Clicking on the task tab will display a list of estimated tasks. Clicking on the Labour tab will display a list of the estimated Labour and clicking on the Materials tab will display the estimated material for this work order.
- Click the applicable boxes on the right hand side of the table while in Estimated Tasks, Labour or Materials.

- Click the TO ACTUALS button at the bottom right hand side of the screen. This will add the task, labour or materials estimate to the applicable tasks, labour or materials actuals. When you return to the Estimates window there will no longer be a checkbox beside the tasks, labour or materials that you added to actuals.

- Click on the RESOURCES menu and select Details from the drop down menu to return to the work order or click on the CANCEL button.

5.1.7. Editing Estimates and Actuals

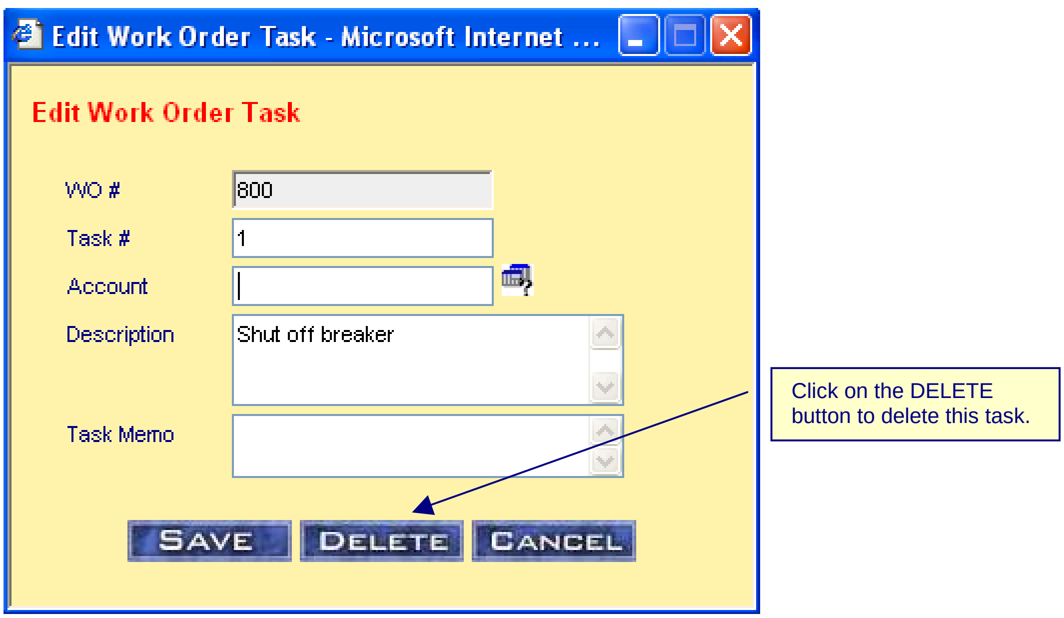
To Edit Estimates or Actuals:

- Open the applicable work order in Edit mode.

- Click on the RESOURCES menu to display the drop down menu.

- Select Estimates or Actuals from the drop down menu.

- **To edit tasks:** Click on the task tab to display a list of tasks. Click on the applicable task in the table to open the Edit Work Order task screen.



- Enter the new information and click on the SAVE button to save the changes to the task.

- Click on the DELETE button if you want to delete this work order task.

- **To edit labour:** Click on the labour tab to display a list of labour. Click on the applicable labour entry in the table to open the Edit Work Order labour screen.

- Enter the new information and click on the SAVE button to save the changes to the labour.

- **To edit materials:** Click on the materials tab to display a list of materials. Click on the applicable material entry in the table to open the Edit Work Order materials screen.

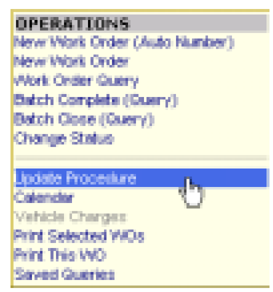
- Enter the new information and click on the SAVE button to save the changes to the materials.

5.1.8. Updating Procedures

This menu item can be used to create a new procedure from the Actuals of a work order or to update the estimates for a procedure with the Actuals from a work order. When you are in the Work Orders module, click on the OPERATIONS menu to display the drop down menu. The Update Procedure menu item is grayed out while in query mode.

To update a procedure:

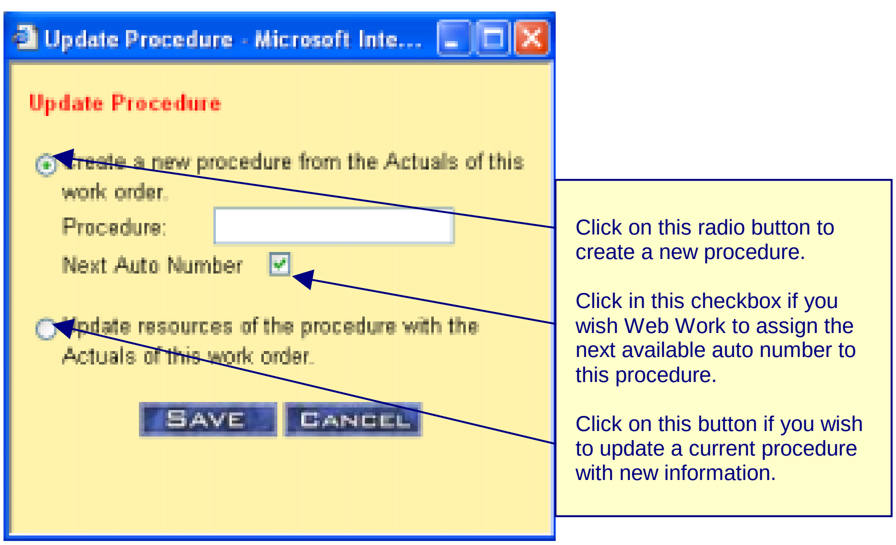
- Click on the OPERATIONS menu and select Work Order Query from the drop down menu.



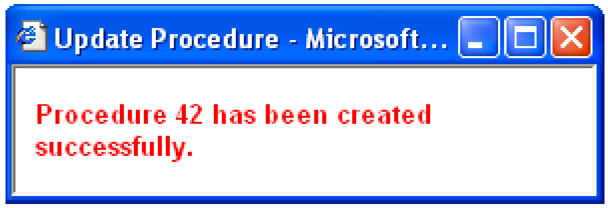
- Perform a work order query to locate and open the applicable work order. See performing work order queries for more information about queries.

- Click on the OPERATIONS menu and select Update Procedure from the drop down menu.

- The Update Procedure screen will open as shown below:



- If you want to create a new procedure using the actuals from this work order click on the radio button beside Create New Procedure and enter a code for this procedure. A message window will open confirming the new procedure has been confirmed.

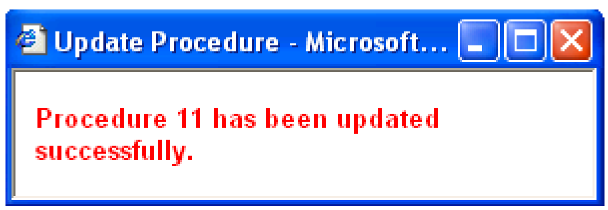


Click the checkbox beside Next Auto Number, if you want the Web Work system to assign the next available auto number to this new procedure.

- If you want to update the resources of a current procedure with the actuals from this work order click on the radio button beside Update resources.

  This will attach all tasks, material and labour associated with this work order to the procedure identified in the Procedure field of this work order.

- A message box will be displayed indicating the procedure has been successfully updated.

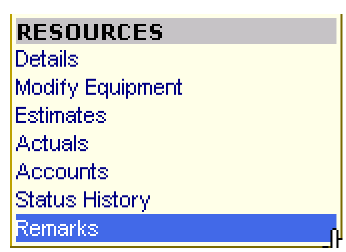


When you update a procedure that has already been assigned to a PM, the procedure for that PM will be updated as well.

6.1 Adding Remarks to a Work Order

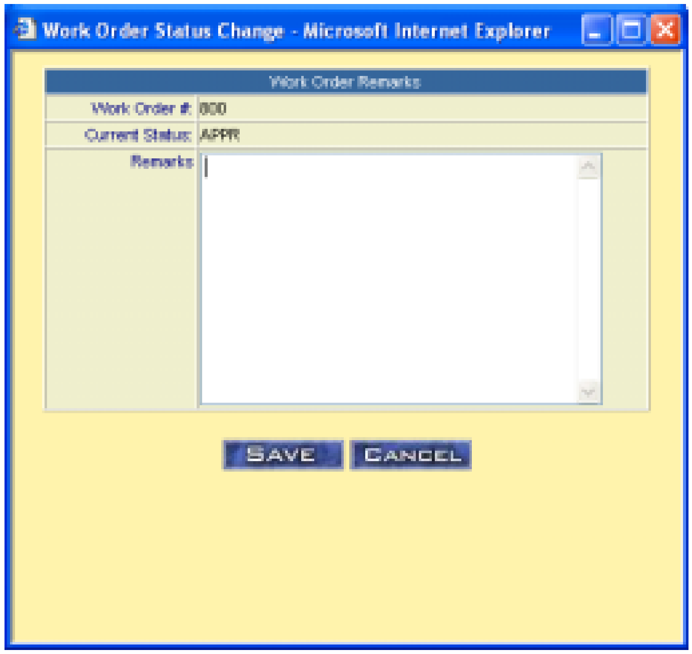
Remarks can be added to a work order, to convey additional information about the work order.

To add remarks to a work order:



- Click on the OPERATIONS menu and select Work Order Query from the drop down menu.
- Perform a work order query to locate and open the applicable work order. See performing work order queries for more information about queries.
- Click on the RESOURCES menu and select Remarks from the drop down menu.

The following screen will open:



- Enter information into the Remarks field.

- Click on the SAVE button 

to save the remarks or the CANCEL button 

to cancel this action.

  At a later date, Remarks can be viewed or edited as required.

7.1 Work Order Accounts

A work order can be assigned to one account or to a variety of accounts depending on the accounting practices of your organization. If only one account will be used to apply the labour and materials for a work order, simply enter the applicable account in the Account # field on the main work order screen.

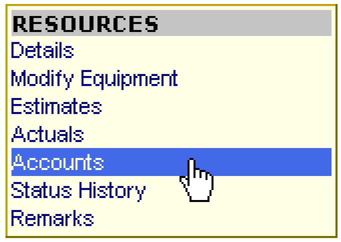
When assigning procedures to multiple accounts you can set the costing to never exceed either the percentage rate (a portion of the total cost – IE: 10%) or the cost total (an amount you choose IE: $223.00) you choose.

7.1.1. <u>Applying the costs of a work order to more than one account</u>

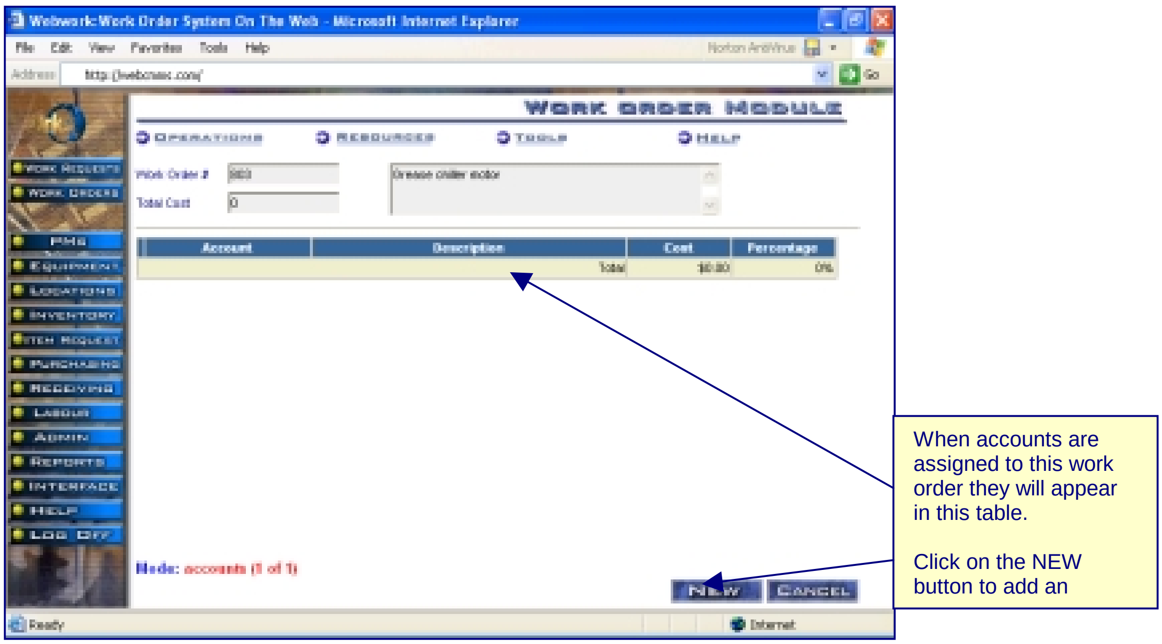
To apply a work order to more than one account:

- Open an existing work order or create a new work order. You must be in EDIT mode to assign accounts to a work order.

- Click on the  menu and select Accounts from the drop down menu.



The Work Order Accounts screen as pictured below will open:



- Click on the NEW button  at the bottom right hand side of the screen to open the Add Work Order accounts window.

- Enter an account into the Account field, or click on the QUERY button  to select an account from the list of accounts in the Web Work database.

- Enter the percentage of the work order that is to be charged to this account. Do not enter a percent sign, only the numerical value of the percent.

- The Cost Amount/Keep Cost feature can only be used after costs have been added to the Work Order actuals.

- Select Keep Percentage or Keep Cost by clicking on the radio button beside the applicable field.

  If Keep percentage is selected, the costs assigned to the account will never exceed the selected percentage. If Keep Cost is selected, the cost assigned to the selected account will never exceed the maximum cost you select.

- Click on the SAVE button  to save this account information. You can then return to the main work order screen by clicking on the the  menu and selecting Details from the drop down menu or you can continue assigning accounts to this work order by clicking on the NEW button  and repeating the preceding instructions.

7.1.2. Editing Work Order Accounts

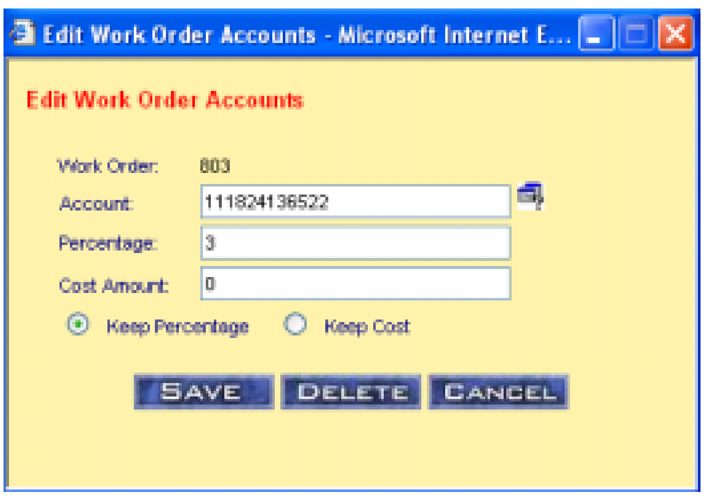
To edit work order accounts:

- Open the applicable work order.

- Click on the  menu and select Accounts from the drop down menu.

- Select the account entry you wish to change by clicking on the applicable Account or Description in the table.

- This will open the Edit Work Order Accounts window as pictured below:



- Update the information as required and then click on the SAVE button  to save the updated information.

- To delete the work order account, click on the DELETE button .

8.1 Performing Work Order Queries

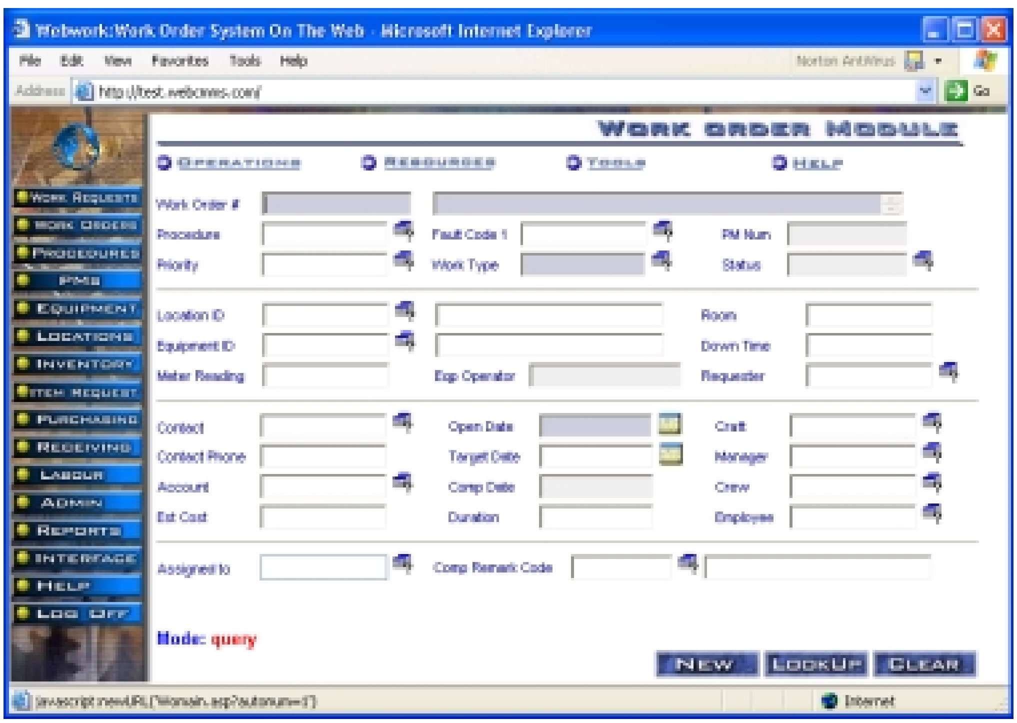
Locating work orders with similar attributes is easy with Web Work's Query by Example feature. See System Overview for more information on query by example.

8.1.1. <u>Performing Work Order Queries</u>

To perform a Work Order Query:

- Click on the WORK ORDERS button WORK ORDERS on the left hand side of the screen to access the Work Orders module. By default the Work Orders module opens in query mode.
- If you have been working in another work order mode, click on the OPERATIONS menu at the top of the screen and select Work Order Query from the drop down menu.

  The work order screen will open in query mode as shown below:



- Enter selection criteria into any of the fields.
- Click on the LOOKUP button LOOKUP to display a list of records matching the criteria you specified.

- To open any of these Work Orders click the selection box on the right hand side of the applicable Work Order(s) in the table, and then click on the RETRIEVE button at the bottom of the screen. The Work Orders will appear on the screen. If you selected multiple Work Orders, when you retrieve them an arrow will appear on the bottom left hand side of the screen. Click on this arrow to move from one work order to the next.

Comparison operators such as: <, >, null, not null and % - wild card can be used to further define a query. See System Overview – Query By Example for more information.

8.1.2. Work Order Queries - Examples

Some examples of work order queries could be:

- To open all work orders that were opened on July 1, 2001: enter 7/1/2001 into the "Open Date" field and click on the LOOKUP button.
- To open all work orders for the equipment CHEV2 that have a status of APPR: Enter CHEV2 into the Equipment field and APPR into the Status field and click on the LOOKUP button.
- To open all work orders that are Priority 1 work orders: enter 1 into the Priority field and click on the LOOKUP button.
- To open all work orders for the location SCH12: enter SCH12 into the Location field and click on the LOOKUP button.

If you want to open all work orders with the criteria you have indicated, you can simply enter the selection criteria into the applicable field (s) and then press the enter button on your computer keyboard.

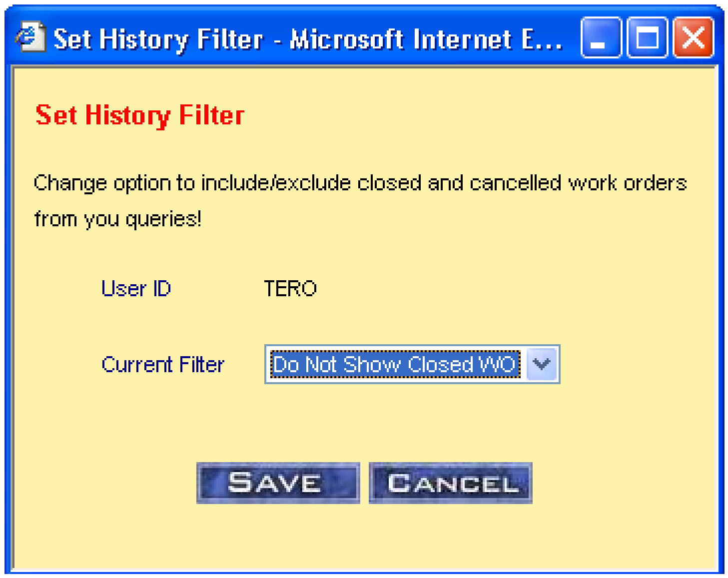
8.1.3. History Filter

The Web Work history filter can be used to include/exclude closed and cancelled work orders from work order queries.

To set the history filter:

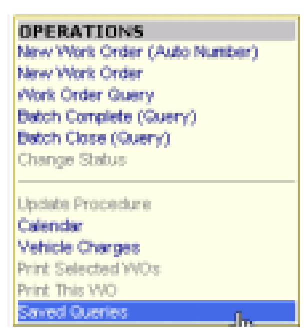
- Click on the WORK ORDERS button on the left hand side of the screen to access the Work Orders module. By default the Work Orders module opens in query mode.
- Click on the TOOLS menu and select History Filter from the drop down menu.

The History Filter screen will open as pictured below:



- Click on the down arrow to select Show Closed Work Orders or Do Not Show Closed Work Orders Only from the drop down menu.
- Click on the SAVE button to save the updated information or the CANCEL button to cancel this action.

8.1.4. Saving Work Order Queries

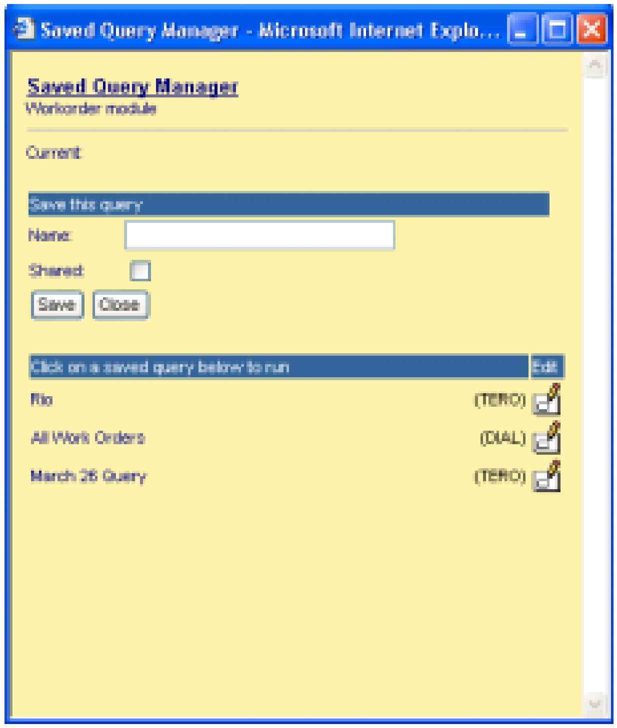


With the Web Work Saved Query feature you can save commonly performed queries to access at a later date.

To Save a Work Order query:

- Perform a work order query. See work order queries for more information on performing queries.
- Click on the OPERATIONS menu and select Saved Queries from the drop down menu.

The Saved Query Manager screen will open as pictured below:



- Enter a name for the Saved Query
- Click on the checkbox beside Shared if the query is to be shared with other users.
- Click on SAVE to save the query. It will now appear in the Saved Query list.
- Click on the to close the Saved Query Manager screen.

8.1.5. Running Saved Queries

To run a saved query:

- Click on the WORK ORDERS button WORK ORDERS on the left hand side of the screen to access the Work Orders module.
- Click on the OPERATIONS menu at the top of the screen and select Saved Queries from the drop down menu to open the Saved Query Manager window.
- Click on the name of the query you want to run.

- The query will be performed and the query screen with a list of records matching the criteria for the query will be listed.

- To open any of these Work Orders click the selection box on the left hand side of the applicable Work Order(s) in the table, and then click on the RETRIEVE button RETRIEVE at the bottom of the screen. The Work Orders will appear on the screen. If you selected multiple Work Orders, when you retrieve them an arrow will appear on the bottom left hand side of the screen. Click on this arrow to move from one work order to the next. Next

8.1.6. <u>Editing Saved Queries</u>

To edit a saved query:

- Click on the WORK ORDERS button WORK ORDERS on the left hand side of the screen to access the Work Orders module.

- Click on the OPERATIONS menu at the top of the screen and select Saved Queries from the drop down menu to open the Saved Query Manager window.

- Click on the EDIT button beside the query you wish to edit.

  The following screen will open:

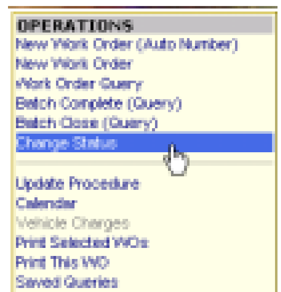
- Make the necessary changes and click on SAVE to save the query. This will return you to the Saved Query Manager window. Click on the name of a query if you wish to run it or on the to close the Saved Query Manager.

9.1 Completing Work Orders

When a work order is finished, change its status to complete.

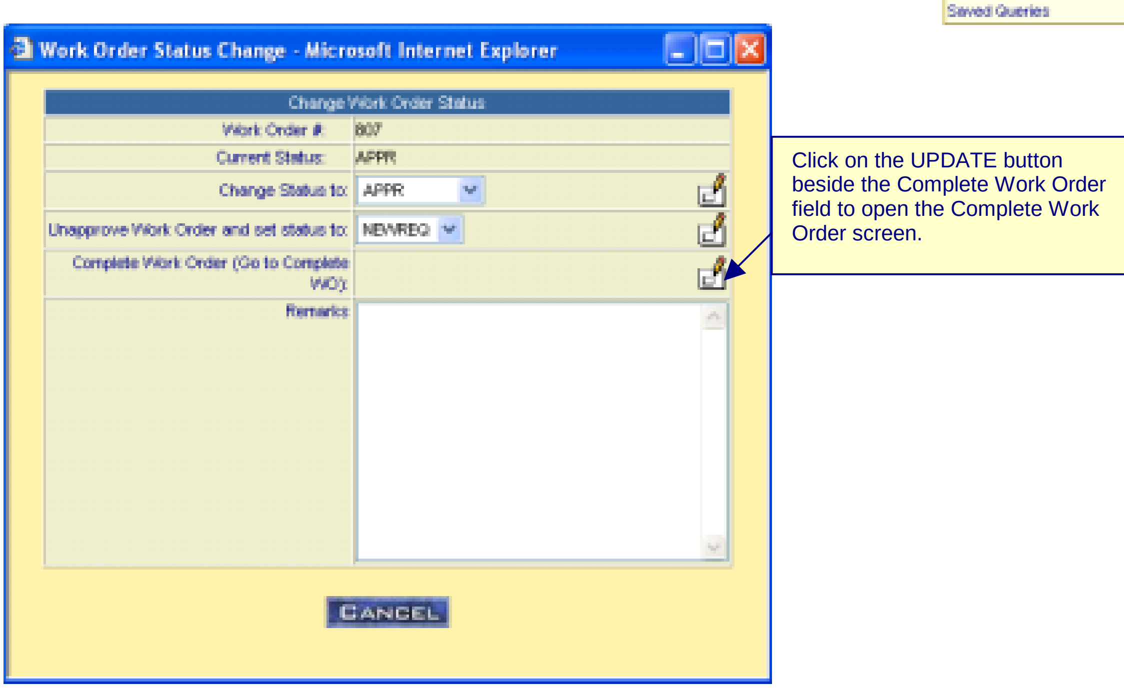
9.1.1. Completing a single work order

- Click on the WORK ORDERS button WORK ORDERS on the left hand side of the screen to access the Work Orders module.

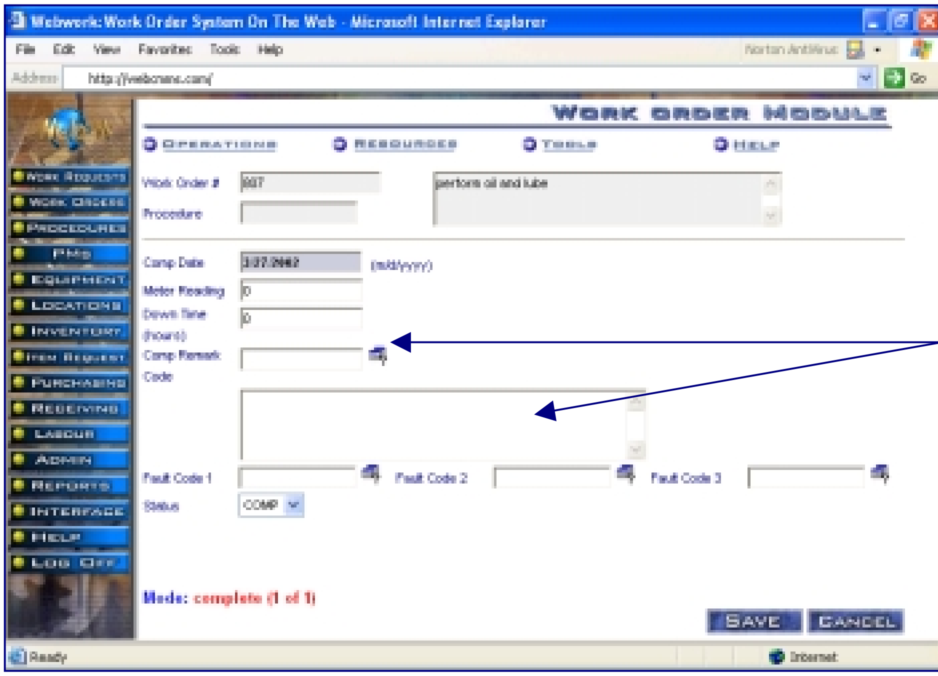


- Locate and open the applicable work order. See Work Order Queries for more information.
- Click on the OPERATIONS menu and select Change Status from the drop down menu.

  A screen similar to the one pictured below will open:



- Click on the update button beside Complete Work Order to open the work order in Complete mode as shown below:



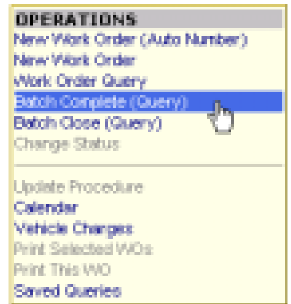
Enter a completion remark or click on the QUERY button beside the Comp Remark field to select a predefined Comp Remark from the Web Work database.

- The Work Order #, Description and Procedure fields are populated by the work order and are read only fields.
- The Comp Date is populated with the current date. To edit this date click your mouse into the field, delete the current date and enter the correct date.
- Enter a Meter Reading if applicable.
- Enter Downtime in hours if applicable.
- Enter a Comp Remark or click on the QUERY button to select a comp remark from the Web Work database. If a Comp Remark is selected, the description for it will be displayed in the memo field. Additional remarks can be added to this field. If you do not use a Comp Remark, you can type in any remarks into the memo field.
- Enter a fault code 1, 2 and 3 if applicable or click on the QUERY button to select a fault code from the Web Work database.
- Click on the SAVE button SAVE to complete the work order and return to the main screen of the work order. You will note that the Status field has been updated to display COMP.

9.1.2. <u>Batch Complete (Query)</u>

The Batch Complete (Query) feature can be used to locate and complete multiple work orders with the criteria you select.

To complete a batch of work orders:

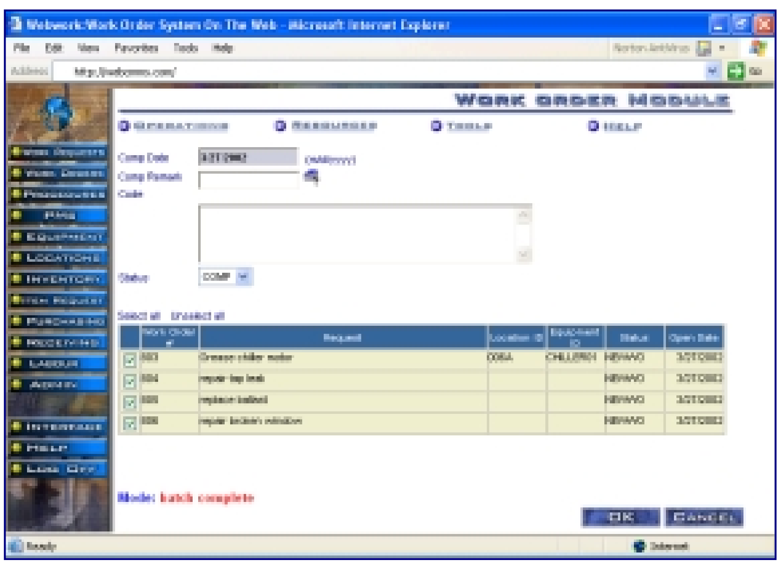


- Click on the WORK ORDERS button on the left hand side of the screen to access the Work Orders module.
- Click on the OPERATIONS menu and select Batch Complete (Query) from the drop down menu.
- The Web Work screen will open in Batch Complete: Query mode.
- Enter selection criteria into any of the fields on the Web Work screen.

  For example if you want to complete all work orders opened on a certain date, enter the applicable date into the Open Date field. For more information on queries see Work Order Queries.

- Click on the LOOKUP button to display a list of records matching the criteria you specified.
- To complete any of these Work Orders click the selection box on the right hand side of the applicable Work Order(s) in the table, or click on Select All to select all the records.
- Click on the RETRIEVE button at the bottom of the screen.

A screen similar to the one pictured below will open:



- The Comp Date is populated with the current date. To edit this date click your mouse into the field, delete the current date and enter the correct date.

- Enter a Comp Remark or click on the QUERY button to select a comp remark from the Web Work database. If a Comp Remark is selected, the description for it will be displayed in the memo field. Additional remarks can be added to this field. If you do not use a Comp Remark, you can type in any remarks into the memo field.

- Click on the OK button to complete the work orders and return to Batch Complete: Query mode.

9.1.3. Viewing Completion Details

To view Completion Details for a work order:

- Click on the WORK ORDERS button on the left hand side of the screen to access the Work Orders module.

- Locate and retrieve the applicable work order. See Work Order Queries for more information.

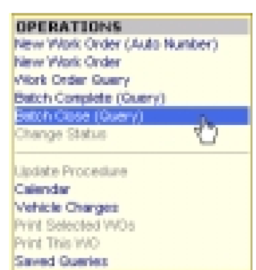
- Click on the RESOURCES menu and select Completion Details from the drop down menu.

- The Work Order Completion Details screen will open.

- When you are finished viewing the completion details, click on the CANCEL button to close the Work Order Completion Details window and return to the work order.

10.1 Closing Work Orders

The Batch Close (Query) feature can be used to locate and close multiple work orders with the criteria you select.



To close a batch of work orders:

- Click on the WORK ORDERS button on the left hand side of the screen to access the Work Orders module.

- Click on the OPERATIONS menu and select Batch Close (Query) from the drop down menu.

- The Web Work screen will open in Batch Close: Query mode.

- Enter selection criteria into any of the fields on the Web Work screen.

  For example if you want to close all work orders completed on a certain date, enter the applicable date into the Comp Date field. For more information on queries see Work Order Queries.

- Click on the LOOKUP button to display a list of records matching the criteria you specified. Only completed work orders will appear in the query results.

- To close any of these Work Orders click the selection box on the right hand side of the applicable Work Order(s) in the table, or click on Select All to select all the records.

- Click on the RETRIEVE button at the bottom of the screen.

- The Close Date is populated with the current date. To edit this date click your mouse into the field, delete the current date and enter the correct date.

- Enter a Closing Remark or click on the QUERY button to select a Comp remark from the Web Work database. If a Closing Remark is selected, the description for it will be displayed in the memo field. Additional remarks can be added to this field. If you do not use a Closing Remark, you can type in any remarks into the memo field.

- Click on the OK button to close the work orders and return to Batch Complete: Query mode.

11.1 Emailing Work Orders

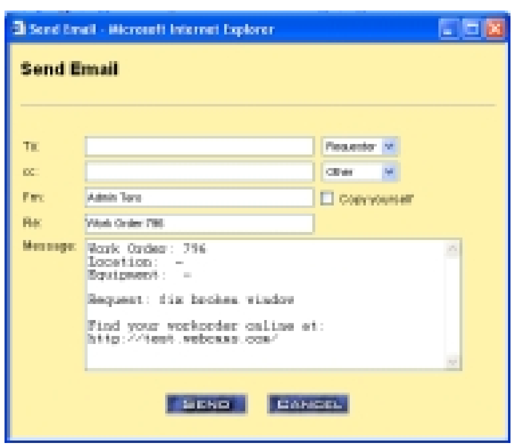
In Web Work a work order can easily be emailed to the requester, employee, Manager or another recipient, using Web Work's built in email functionality.

To Email a Work Order:

- Open the applicable work order by performing a work order query. See work order queries for more information on performing queries.

- Click on the TOOLS menu and select Email from the drop down menu.

  When you select Email from the Tools menu, the Web Work Email function screen will open as shown below:



- Enter information into the applicable fields.

  To Field: You can choose to email the open work order to the Requester, Employee, Manager or another person you define. Note: If you select Requester, Employee or Manager, the email address contained in the labour record for the person named in these fields of the work order is the address where the work order will be sent.

  This work order can also be sent to a cellular phone – providing the cellular phone has email functionality. Simply enter the email address for the cell phone into the To field of the Email screen.

  CC Field: You can choose to carbon copy the open work order to the Requester, Employee, Supervisor or another person you define. Note: If you select Requester, Employee or Supervisor, the email address contained in the labour record for the person named in these fields of the work order is the address where the work order will be sent.

  From Field: The email address of the person logged into the system will be displayed in this field.

  Copy Yourself: Click on the check box beside Copy Yourself to have this email sent to your default email address.

  Subject Field: The Re: or Subject field by default will contain the Work Order identification number. You can add to this information or change this information as required.

  Message Field: The message field contains the work order id, location, equipment and request. You can add to this information as required.

- Click on the SEND button to send this email and return to the work order screen. If you wish to exit this screen without sending this email click on the CANCEL button .

If you have multiple work orders open, only the one displayed on the screen will be emailed. To send additional work orders by email, open the details page of the applicable work order and then follow the steps above.

The default email server is setup in the Admin module. See Admin module – System defaults for more information on this function.

12.1 Printing Work Orders

There are two ways to print work orders. You can print an individual work order or multiple work orders that you have selected and retrieved.

12.1.1. <u>To print only the Work Order that is currently displayed on the screen:</u>

- Click on the PRINT button at the bottom right hand side of the screen or click on the OPERATIONS menu and choose Print this WO from the drop down menu.

- The selected record will open in a new browser window.

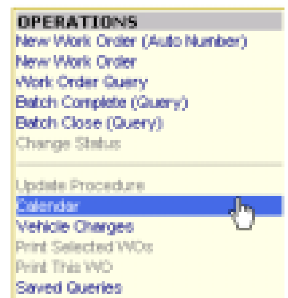
- Click on File and select Print from the drop down menu to proceed with printing.

12.1.2. Printing Multiple Work Orders

To print multiple work orders:

- Perform a work order query to open the desired work orders. See Work Order Queries for more information on performing queries.
- Click on the OPERATIONS menu and choose Print Selected WOs from the drop down menu.
- The selected work orders will open in a new browser window. Click on File and select Print from the drop down menu to proceed with printing.

13.1 Work Order Calendars



The Work Order module includes a calendar, which displays work orders by target date. The contents of the calendar can be filtered by: Location, Equipment, Craft, Crew, Manager or Employee. The calendar is a useful scheduling tool.

To view the calendar, click on the OPERATIONS menu and select Calendar from the drop down menu.

The following screen will open:

To print the calendar click on the PRINT button Print at the bottom right of the screen. This will print the calendar displayed on the screen.

To sort click on the down arrow beside the PMs for field and select Location, Equipment, Employee, Craft, Crew or Manager.

Enter the code for the applicable selection into the next field, or click on the QUERY button and select the applicable code from the Web Work database. Click on the GO button GO to display a calendar matching the criteria you selected.

Click on the arrows on either side of << Month >> to move from one month to the next.

To view details about a specific calendar entry, click on the three dots after the applicable entry on the calendar.

A screen similar to the one shown below will open:

To open any of the Work Orders displayed click on the applicable Work Order #. To open all Work Orders displayed for this date click on Select All.

To return to the monthly calendar click on Back to Monthly Calendar.

The calendar is Read Only.

14.1 Modifying Equipment

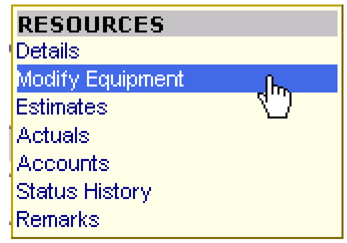
The modify equipment feature can be used to change the location of a piece of equipment, change the equipment operator or change the status of a piece of equipment.

To modify the equipment:

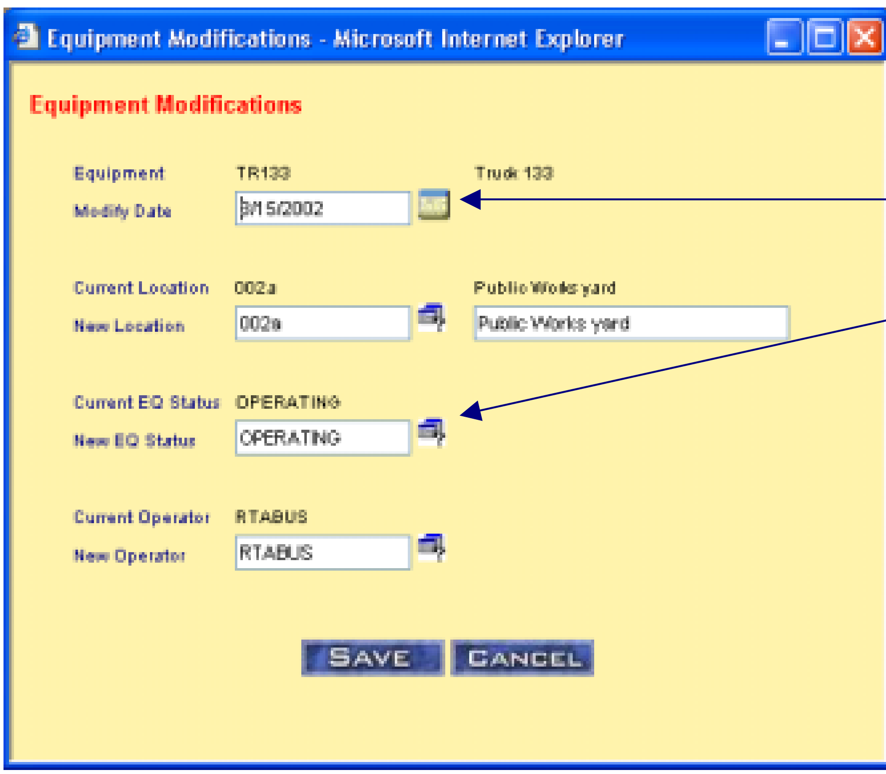
- Click on the WORK ORDERS button on the left hand side of the screen to access the Work Orders module.

- Locate and open the applicable work order.

- Click on the RESOURCES menu and select Modify Equipment from the drop down menu.



The following screen will open:



Click on the CALENDAR button to open a calendar and select an alternative date.

Click on the QUERY button to see a list of codes in the Web Work database.

- Enter a new Modification date if applicable or click on the CALENDAR button and select the date from the calendar.

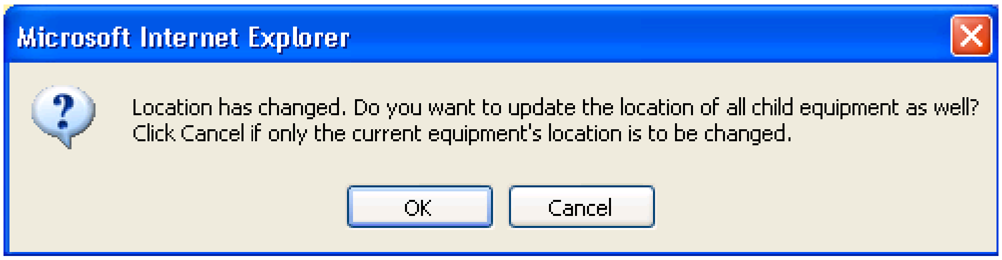
- Enter the new Location into the New Location field or click on the QUERY button to select the location from the Web Work database. The location description will fill in automatically.

- Enter a new EQ Status if applicable into the New EQ Status field or click on the QUERY button to select one from the Web Work database.

- Enter a new Operator (if applicable) into the New Operator field or click on the QUERY button to select the operator from the Web Work database.

- Click on the SAVE button SAVE. The Equipment record will be updated with the new information.

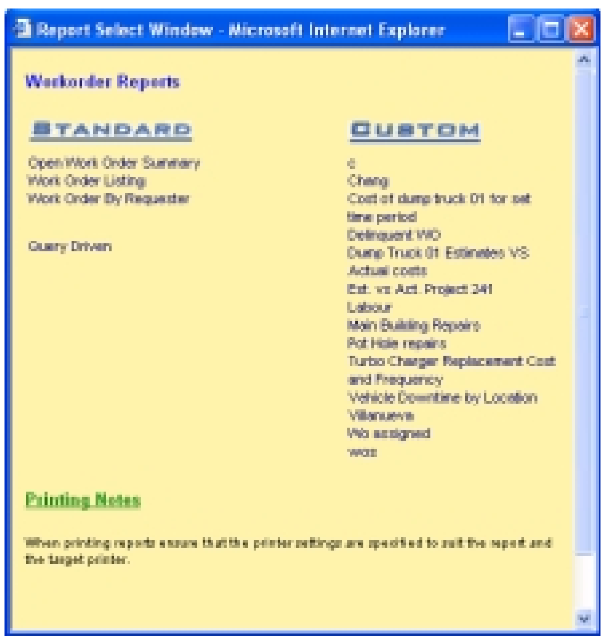
If the equipment has any child equipment associated with it a message box like the one shown below will be displayed. Click on the *OK* button to update the child equipment, click on the CANCEL button if only the current equipment's location is to be changed.



15.1 Work Order – Reports

To access Work Order reports click on the TOOLS menu and select Reports from the drop down menu.

A screen similar to the one shown below will open:



Click on any of the Reports listed under Standard or Custom, to open them.

Only reports applicable to the Work Order module will be displayed. To view all reports, click on the REPORTS module button on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.

15.1.1. Creating Work Order Reports

Reports cannot be created in the Work Order module. To create work order reports click on the REPORTS module button to access the report writer and create the report.

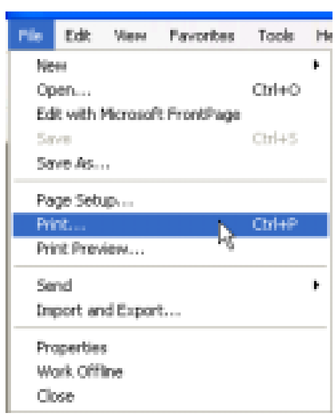
15.1.2. Printing Work Order Reports

Work Order reports can be printed from the Work Order module or from the Reports module.

To print a report in the Work Order module:

- Open the Work Order module.
- Click on the TOOLS menu and select reports from the drop down menu.
- Select the report you wish to print by clicking on its title.

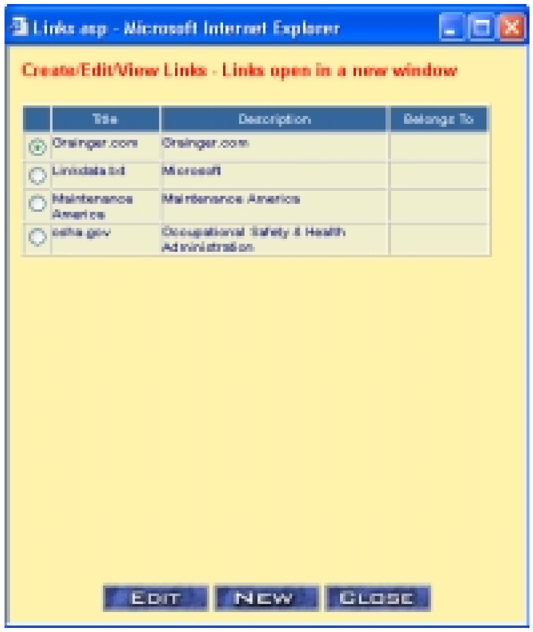
  The report will open in Preview mode.
- Click on File and select Print from the drop down menu to print the report.



When printing reports ensure that the printer settings are specified to suit the report and the target printer.

16.1 Links

When you are in the Work Order module and select Links from the TOOLS menu, the Web Work Create/Edit Links window will open as shown below. You can view existing links or create new links using this feature.



You can only view links, which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.

For information on creating New links see the Links section of this manual.